



## Staff Tutorials

### Canceling Holds

Often, a patron may call in and ask you to cancel a hold for them. While they can do this from the online OPAC, this may not always be possible for the patron.

To cancel holds from the staff client, first click “Search” and “For Patrons”.

Enter the patrons name and click “Search”.

The screenshot shows a web browser window with the address bar displaying '1: mgr1-ma-demo-circ1@PIED-AUB-isl.demo.gapines.org'. The browser has a menu bar with 'File', 'Edit', 'Search', 'Circulation', and 'Cataloging'. The status bar at the bottom shows '1 Patron Search' and '2 Bib Record: PIN97065102'. The main content area is titled 'No Patron Selected' and contains a 'Search for Patron' form. The form includes a checkbox for 'Include inactive patrons?' and a dropdown menu for 'Limit results to patrons in' set to 'Everywhere'. Below these are input fields for 'Last Name', 'First Name', 'Middle Name', 'Email', 'Phone', 'ID', 'Address 1', 'Address 2', 'City', and 'ZIP'. At the bottom of the form are 'Search' and 'Clear Form' buttons. The right side of the page is mostly blank, with a 'Search Form' button and a 'Retrieve Patron' button visible at the top right.

Select the correct patron from the right pane and click “Retrieve Patron”

1: mgrl-ma-demo-circ1@PIED-AUB-isl.demo.gapines.org

File Edit Search Circulation Cataloging Admin (-) Help

1 Patron Search 2 Bib Record: PIN97065102

Smith, Alexis Erin Search Form Retrieve Patron

(Expired) (Juvenile)

**▼Status**

TempRes6  
WGRL-WB  
Internet: Filtered  
Expires on 2006-02-26

Holds: 0  
Available: 0  
Bills: \$0.00  
Check Outs: 0  
Overdue: 0  
Long Overdue: 0  
Claimed Returned: 0  
Lost: 0  
Non Cat: 0

**▼ID/Contact Info**

Library Card: [367499](#)  
ID 1: Other  
ID 2:  
DOB: 1992-03-09

Day Phone:  
Evening Phone:  
Other Phone:

OPAC Login: Top47  
Email:

**▼Mailing Address**

8412 Interview Estate  
Sigurd UT 84657

**▼Physical Address**

Barred	Birth Date	Family Name	First Name	Middle Name
No	1966-03-25	Smith	Adam	Todd
No	1965-11-22	Smith	Adam	Todd
No	1990-04-21	Smith	Adam	William
No	1996-02-18	Smith	Adrian	Milton
No	1970-01-01	Smith	Agatta	
No	1965-07-07	Smith	Agnes	Barbara
No	1999-04-27	Smith	Agnes	Vickie
No	1991-07-15	Smith	Aimee	Mary
No	1966-10-07	Smith	Alan	
No	1964-02-18	Smith	Alan	Richard
No	1961-12-04	Smith	Albert	
No	1977-07-23	Smith	Albert	Billy
No	1993-10-15	Smith	Alex	Charles
No	1975-10-04	Smith	Alex	Charles
No	1967-10-06	Smith	Alexander	
Yes	1964-11-22	Smith	Alexander	Samuel
No	1992-03-09	Smith	Alexis	Erin
No	1990-08-28	Smith	Alfonso	Jesse
No	1983-09-26	Smith	Alfred	Brian
No	1981-02-06	Smith	Alice	
No	1976-12-05	Smith	Alice	
No	1985-05-02	Smith	Alice	Beth
No	1978-01-11	Smith	Alice	Ethel
No	1961-10-22	Smith	Alice	Ruby
No	1982-05-07	Smith	Alice	Shirley
No	1967-11-16	Smith	Alicia	
No	1985-05-05	Smith	Alicia	Brenda
No	1969-02-24	Smith	Alicia	Patty
No	1984-07-04	Smith	Allen	David
No	1960-12-09	Smith	Allen	George
No	1972-05-01	Smith	Allen	Joe
No	1976-01-22	Smith	Allen	Robert
No		Smith	Aloysius	
No	1978-09-11	Smith	Amber	
No	1974-09-04	Smith	Amber	
No	1983-01-23	Smith	Amy	
No	1980-02-26	Smith	Amy	
No	1978-02-16	Smith	Amy	Maria
No	1996-02-16	Smith	Ana	
No	1999-09-19	Smith	Andrew	
No	1963-10-28	Smith	Andrew	
No	1974-09-13	Smith	Andrew	Glen
No	1964-04-09	Smith	Angela	
No	1963-11-23	Smith	Angela	
No	1980-10-10	Smith	Anoela	Heather

Save Columns Copy to Clipboard Print

From the patron information screen, click “Holds” to view

1: mgrl-ma-demo-circ1@PIED-AUB-isl.demo.gapines.org

File Edit Search Circulation Cataloging Admin (-) Help

1 Patron Search 2 Bib Record: PIN97017331 3 Patron Search 4 Patron: Smith, Alexis Erin

Smith, Alexis Erin (Expired) (Juvenile)

Refresh Check Out Items Out **Holds** Bills Edit Info Exit

**▼Status**

TempRes6  
WGR-LWB  
Internet: Filtered  
Expires on 2006-02-26

Holds: 1  
Available: 0  
Bills: \$0.00  
Check Outs: 0  
Overdue: 0  
Long Overdue: 0  
Claimed Returned: 0  
Lost: 0  
Non Cat: 0

**▼ID/Contact Info**

Library Card: [367499](#)  
ID 1: Other  
ID 2:  
DOB: 1992-03-09

Day Phone:  
Evening Phone:  
Other Phone:

OPAC Login: Top47  
Email:

**▼Mailing Address**

8412 Interview Estate  
Sigurd UT 84657

**▼Physical Address**

**Holds**

Actions for Selected Holds

Available On	Capture Date	Current Copy	Last Notify Time	Notices	Pickup Lib	Request Date	Status	Title	Type
		No Copy		0	ARL-PW...	2008-09-02	Waiting fo...	Harry Potter and th...	V

Print Export

Any current holds will appear in the “Holds” window. To cancel a particular hold, select the line of the hold and click “Actions for Selected Items” and “Cancel Hold”

The screenshot shows the Evergreen Indiana library system interface. The browser address bar displays `1: mgrl-ma-demo-circ1@PIED-AUB-isl.demo.gapines.org`. The interface includes a menu bar (File, Edit, Search, Circulation, Cataloging) and a toolbar with buttons for Refresh, Check Out, Items Out, Holds, Bills, Edit, Info, and Exit. The main content area is divided into two panes. The left pane displays the patron's status and contact information for **Smith, Alexis Erin** (Expired, Juvenile). The right pane shows the **Holds** section with a table of holds. A context menu is open over the holds table, showing the **Cancel Hold** option.

**Patron Information:**

- Smith, Alexis Erin** (Expired) (Juvenile)
- TempRes6**
- WGRL-WB**
- Internet: Filtered**
- Expires on 2006-02-26**
- Holds:** 1
- Available:** 0
- Bills:** \$0.00
- Check Outs:** 0
- Overdue:** 0
- Long Overdue:** 0
- Claimed Returned:** 0
- Lost:** 0
- Non Cat:** 0

**ID/Contact Info:**

- Library Card:** 367499
- ID 1:** Other
- ID 2:**
- DOB:** 1992-03-09
- Day Phone:**
- Evening Phone:**
- Other Phone:**
- OPAC Login:** Top47
- Email:**

**Mailing Address:**

- 8412 Interview Estate
- Sigurd UT 84657

**Physical Address:**

**Holds Table:**

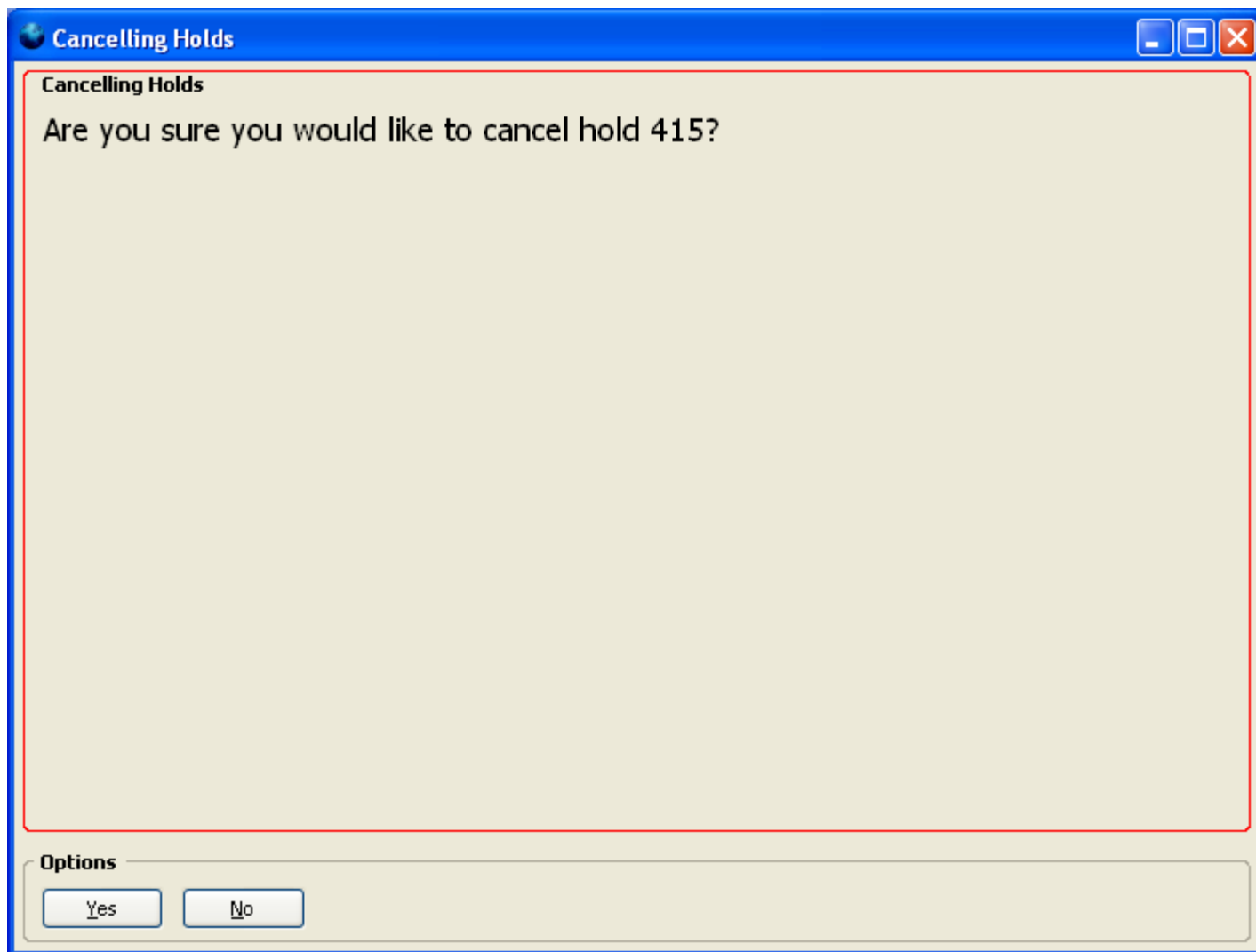
Available On	Capture Date	Current Copy	Last Notify Time	Notices	Pickup Lib	Request Date	Status	Tr
		No Copy		0	ARL-PW...	2008-09-02	Waiting fo...	Ha

**Actions for Selected Holds:**

- Copy to Clipboard
- Show in Catalog
- Show Item Details
- Show Last Few Circulations
- Retrieve Patron
- Show Notices
- Edit Pickup Library
- Edit Phone Notification
- Set Email Notification
- Edit Activation Date
- Activate Hold
- Suspend Hold
- Mark Item Damaged
- Mark Item Missing
- Find Another Target
- Cancel Hold**
- Save Columns

The taskbar at the bottom shows the Windows Start button and several open applications: Mozilla Firefox, ISL Inspire - Inbox in ..., evergreen\_indiana-m..., Evergreen Staff Client 3, and 1: mgrl-ma-demo-circ...

The confirmation screen will appear.



Select "Yes" to cancel the hold.